

Equity	Latest	% Chg	NSE Sect. Indices	Latest	% Chg
Nifty	5,609	0.34	CNX IT	6,269	(0.64)
Sensex	18,629	0.48	BANK NIFTY	11,181	0.02
DowJones	14,760	0.69	S&P CNX 500	4,350	0.10
Nasdaq	3,348	0.82	CNX FMCG	16,425	0.51
Hangseng	20,018	0.81	CNX REALTY	183	0.44
Shanghai	1,931	(0.97)	CNX AUTO	4,457	0.39
Nikkei	12,926	(0.34)	CNX ENERGY	7,494	0.82
Strait Times	3,107	0.54	CNX PHARMA	6,516	(0.57)
Kospi	1,779	(0.10)	Advances / Declines	BSE	NSE
Taiwan	7,752	1.16	Advances	953	513
FTSE	6,102	1.21	Declines	1351	775
CAC	3,650	1.51	Unchanged	141	65
DAX	7,811	1.55	Total	2445	1353

Nifty Gainers		
Company	Price(Rs)	Chg(%)
BHARTIARTL	296.00	4.43
INDUSINDBK	471.50	3.92
ONGC	310.45	3.90
RELINFRA	333.00	3.66
M&M	957.50	3.30

Nifty Losers		
Company	Price(Rs)	Chg(%)
TATAPOWER	79.40	-3.41
CAIRN	274.60	-3.12
POWERGRID	102.70	-3.02
LUPIN	774.05	-2.85
NTPC	138.25	-2.64

Vol. Shockers	Last Day (Lakh)	2 Wk Avg. (Lakh)	Vol. Ch. (Times)
Page Inds	0.15	0.02	8.31
Power Grid Corp	24.06	3.10	7.75
Birla Corp	2.41	0.33	7.31
IRB Infra	37.18	5.17	7.20
Videocon Inds	7.04	1.12	6.27

Indian Forex	Closing	Chg	% Chg
USD/INR	59.703	0.031	0.05%
GBP/INR	92.2531	-0.436	-0.47%
EUR/INR	78.3826	-0.154	-0.20%
JPY/INR	61.25	-0.59	-0.97%

Precious Metal	Closing	Chg (Rs.)
Gold (Rs/10gm)	26,792	(62)
Silver (Rs/1kg)	40,877	(122)

Commodities	Price	% chg.
Crude (US\$/BBL)	94.9	(0.43)
Brent (US\$/BBL)	101.1	(0.19)
Gold (US/oz)	1,255.0	(1.78)
Silver (US\$/oz)	19.0	(3.26)
Copper (US\$/MT)	6,726.5	1.89
Alum (US\$/MT)	1,744.5	0.76
Zinc(US\$/MT)	1,805.0	1.44

ADR	Cl. Values	% Chg.
ICICI Bank	38.01	1.66
HDFC Bank	35.18	3.75
Infosys	40.27	2.70
Sterlite Inds.	5.31	(0.19)
Dr Reddy's Labs	35.72	0.70
Wipro	7.20	2.27
Tata Motors	23.65	2.65

Market Sensor

U.S market logged gains across the board Tuesday, erasing most of their losses from the previous day's selloff, as a batch of better-than-expected economic reports trumped worries over a credit crunch in China. Dow Jones Industrial Average was up 0.69% or 100.75 points at 14760.31. Nasdaq Composite was up 0.82% or 27.13 points at 3347.89. Standard & Poor's 500 was up 0.95% or 14.94 points at 1588.03.

Asian and European market witnessing sharp recovery followed by short covering activity of June expiry resulted in Nifty to end a tad higher yesterday. Nifty ended the previous trading session with a gain of 0.34% or 18.85 points at 5609.10. On Friday's trading session, FIIs sold net Rs.1285.86 Cr in cash market and sold net Rs 149.35 Cr. in derivative segment. Whereas, DII bought net Rs 824.36 Cr in cash segment.

Coming to today's trade, Market will continue to remain rangebound with crucial intraday support at 5560.

Global News

❖ Asian stocks rose, lifting the regional benchmark from the lowest in almost seven months, after housing data bolstered the U.S. economic outlook and China's cash crunch eased. Gold slumped and the yen weakened. (Bloomberg)

❖ With proposed deals valued at more than \$11 billion, Telefonica SA and Vodafone Group Plc are laying down a challenge to European regulators who have a history of opposing moves that reduce competition in telecommunications. (Bloomberg)

❖ An immigration Bill endorsed by US President Barack Obama easily cleared an important test on Monday when the US Senate backed new border security steps seen as essential to the legislation's fate. (Bloomberg)

❖ The cost of locking in China's interest rates slid for a fourth day, the longest run of declines since February, and money-market rates fell after the central bank pledged to ease the worst cash crunch in a decade. (Bloomberg)

Economic News

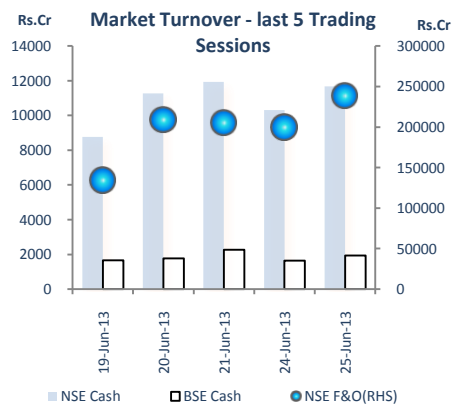
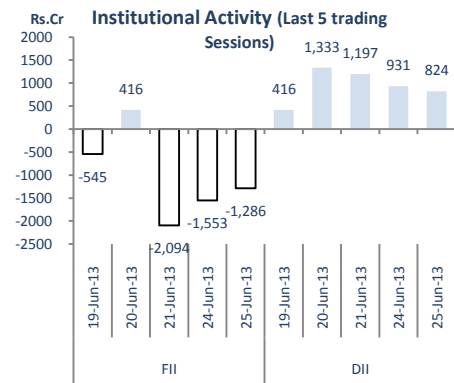
- ❖ After the deregulation of sugar and removal of levy mechanism, the food ministry and states are now struggling with the new problem of delay in lifting up of remaining stock of levy sugar for the year 2011-12. (BS)
- ❖ The Coal Ministry today assured the Karnataka government to look into the state's request for allotment of mines for its power plants. (BS)
- ❖ The Reserve Bank of India has made it easier for property developers to access foreign money in an effort to spur low-cost housing projects, such as slum rehabilitation. (BS)
- ❖ The Reserve Bank today tightened norms for lending against goldcoins as well as units of gold ETFs and mutual funds by Regional Rural Banks (RRBs) in a bid to curb demand. (BS)
- ❖ Taking ahead its crusade against firms sitting idle on coal blocks allotted to them, the Inter-Ministerial panel today reviewed the progress of 56 coal blocks of firms like JSPL and Arcelor Mittal and recommended issuing show cause notices in case of few firms. (BS)
- ❖ The National Bamboo Mission, an annual Rs 100 crore Centrally Sponsored Scheme (CSS) under the Department of Agriculture, will no longer run as a separate programme. (BS)
- ❖ Finance Ministry will next month review financial and operational performance of about major 70 schemes, like mid-day meal, bank recapitalisation and rural employment guarantee scheme, and has sought expenditure details from the concerned ministries and departments. (BS)

Domestic News

- ❖ Competition Commission of India (CCI) has approved the proposed acquisition of a Strides Arcolab subsidiary by Mylan Inc, saying the deal will not have an adverse impact on competition in India. (BS)
- ❖ Coal India Ltd today said it would place orders worth Rs 2,000 crore for at least seven coal washeries by the current fiscal. (BS)
- ❖ Private general insurer L&T General Insurance today launched a card to facilitate instant cashless claim authorisation under the brand name MediCash Card (BS)
- ❖ Tamil Nadu government today said that it is ready to buy the centre's 5% stake in the Neyveli Lignite Corporation (NLC). (BS)
- ❖ Oil India Limited (OIL) along with ONGC Videsh Limited (OVL) will be spending \$2.475 billion (Rs 14,765 crore as per today's exchange rate) for acquiring 100% shares in Videocon Mozambique Rovuma 1 Ltd. (BS)
- ❖ Close on the heels of announcing the launch of its India marketplace, Amazon.in today announced the launch of three new stores: mobiles and accessories, cameras and photography, and portable media players. Indian shoppers can now shop for more than 20,000 electronic products. (BS)
- ❖ Drug firm Strides Arcolab today said it has received World Health Organisation (WHO) pre-qualification for its anti-malarial tablets and the company will launch the product immediately. (BS)
- ❖ Heavy rainfall in the upper end of Hati river has affected hydro power generation at Indravati power station. As the weather department has warned about more rainfalls in next 48 hours, generation at other stations in south Odisha could get affected too, officials said. (BS)
- ❖ Bajaj Auto, India's second largest bike manufacturer, today launched the second offering from the KTM stable, the Duke 390 for Rs 1.8 lakh (ex-showroom Delhi). (BS)

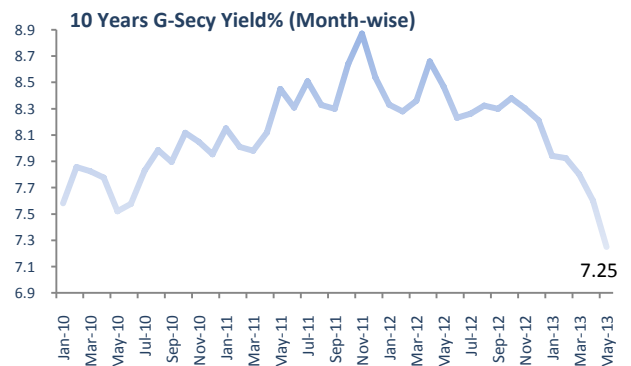
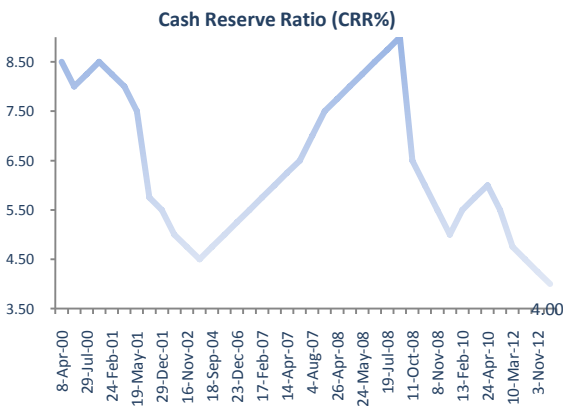
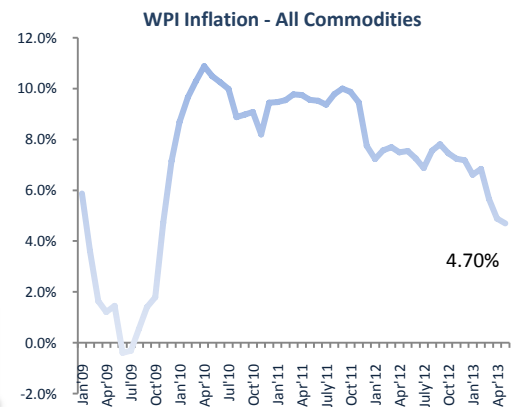
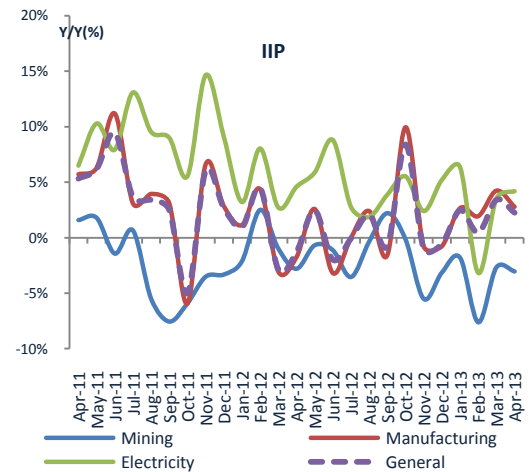
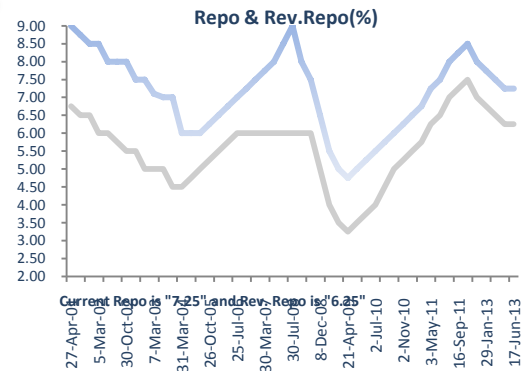
Global Forex	Closing	Chg	% Chg
EUR-USD	1.3075	-0.0002	-0.02
GBP-USD	1.5416	-0.0005	-0.04
USD-JPY	97.77	-0.04	-0.04

Bond Markets	Closing	Chg
10-yr bond	7.61	-0.3 bps
Interbank call	7.16	-6.0 bps



Domestic News(Conti..)

- ❖ Telecom Minister Kapil Sibal is learnt to have approved levying of Rs 650 crore penalty on Bharti Airtel for violating roaming norms in 13 service areas between 2003 and 2005. (BS)
- ❖ ONGC Videsh Ltd (OVL) and Oil India Ltd (OIL) have signed definitive agreements to acquire Videocon Industries' 10% stake in Mozambique gas field for \$2.475 billion (Rs 14,900 crore). (BS)
- ❖ Joining the bandwagon of companies slashing mobile Internet tariffs, telecom operator Tata Docomo today announced a cut in its 2G and 3G mobile Internet rates by a whopping 90% from 10 paise to 1 paise per kilobytes from 1 July. (BS)
- ❖ The Children's Investment Fund Management (TCI), a UK-based investor that has a lawsuit pending against Coal India Ltd, the world's largest coal miner, has sold nearly 19% of its shareholding in the company since April, a Coal India source said. (BS)
- ❖ After the Andhra Pradesh high court gave a green signal for the merger of erstwhile fraud-ridden Satyam Computer Services (later re-branded as Mahindra Satyam) with Tech Mahindra, the management of the later has announced a formal amalgamation of the two companies. (BS)
- ❖ On Tuesday, the Supreme Court dismissed a Public Interest Litigation (PIL) asking for a ban on medicines manufactured by Ranbaxy Laboratories in India. (BS)
- ❖ Sounding bullish on its motorcycle business, Mahindra Two Wheelers, which is set to roll out its second 110-cc bike 'Centuro' early next month, has said it is eyeing to double exports over the next one year and is also looking at new markets overseas. (BS)
- ❖ The country's largest jewellery retailer Gitanjali Gems today said it will reduce sale of gold coins and bars items and rather focus on lower carat jewellery and value-added products. (BS)
- ❖ Market regulator Sebi today allowed start-ups and small and medium enterprises to get listed on bourses without making an initial public offering, while new rules have been put in place for angel investors. (BS)



Bulk Deal - NSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
25-Jun-13	Karnataka Bank Limited	RELIGARE FINVEST LTD	SELL	1200000	106.86
25-Jun-13	Asian Hotels (East) Ltd	JESMIN INVESTMENTS LIMITED	SELL	425000	131
25-Jun-13	IVRCL Limited	AMBIT SECURITIES BROKING PVT. LTD.	SELL	3125071	13.01
25-Jun-13	Goenka Diamond&Jewels Ltd	MACQUARIE BANK LIMITED	SELL	1750000	17.62
25-Jun-13	IVRCL Limited	TRANSGLOBAL SECURITIES LTD.	SELL	2114607	13.02

Bulk Deal - BSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
25-Jun-13	Choice Infra	JAGDISH CHANDRA BANSAL	B	240000	49.88
25-Jun-13	Inventure Growth	ACIL COTTON INDUSTRIES LIMITED	B	1502813	5.02
25-Jun-13	Maestros Med-\$	MAVI INVESTMENT FUND	S	238726	26.05
25-Jun-13	Magna Electro-\$	OJAS CONSULTING PVT LTD	S	25000	72
25-Jun-13	Concurrent India	BABU SUDHIR KONERU	S	1000000	1

Corporate Actions

Scrip Code	Scrip Name	Ex-Date	Purpose	Rs.
531162	Emami-\$	26-Jun-13	Dividend	8
531162	Emami-\$	26-Jun-13	BONUS 1:2	-
511369	First Financial	26-Jun-13	Dividend	0.2
590085	Gloster	26-Jun-13	BONUS 1:1	-
590085	Gloster	26-Jun-13	Dividend	10
511288	Gruh Finance	26-Jun-13	Dividend	2.5
505893	Hindustan Hardy	26-Jun-13	Dividend	3
532652	Karnataka Bank	26-Jun-13	Dividend	4
505681	Bimetal Brngs-\$	27-Jun-13	Dividend	9
500280	Century Enka	27-Jun-13	Dividend	6
513353	Cochin Mnrl-\$	27-Jun-13	Dividend	-
513353	Cochin Mnrl-\$	27-Jun-13	Special Dividend	-
533146	DLINK IND	27-Jun-13	Dividend	0.5
500086	Exide Inds	27-Jun-13	Final Dividend	0.6
532631	Fame India	27-Jun-13	Amalgamation	-
500010	HDFC	27-Jun-13	Dividend	-
500210	Ingersoll Rand	27-Jun-13	Final Dividend	3
512329	Jarigold Tex	27-Jun-13	Dividend	0.1
500234	Kakatiya Cem	27-Jun-13	Dividend	2.7
506528	Keltech Ener	27-Jun-13	Dividend	2.5
530377	Nila Infra	27-Jun-13	Final Dividend	0.1

Global Economic Calendar

Date	Curr.	Event	Actual	Forecast	Previous
24-Jun-13	USD	Chicago Fed National Activity			-0.53
24-Jun-13	USD	Dallas Fed Mfg Business Index			-10.5
25-Jun-13	USD	Core Durable Goods Orders (MoM)		-0.10%	1.50%
25-Jun-13	USD	House Price Index (YoY)			7.20%
25-Jun-13	USD	CB Consumer Confidence		75.2	76.2
25-Jun-13	USD	New Home Sales		463K	454K
26-Jun-13	USD	GDP (QoQ)		2.40%	2.40%
27-Jun-13	GBP	Current Account		-11.8B	-14.0B
27-Jun-13	EUR	Consumer Confidence		-19	-21.9
27-Jun-13	USD	Core PCE Price Index (MoM)		0.10%	
27-Jun-13	USD	Initial Jobless Claims		345K	354K
27-Jun-13	USD	Personal Spending (MoM)		0.30%	-0.20%
27-Jun-13	USD	Pending Home Sales (MoM)		1.00%	0.30%
28-Jun-13	JPY	Manufacturing PMI			51.5
28-Jun-13	JPY	Tokyo Core CPI (YoY)		0.20%	0.10%
28-Jun-13	JPY	Industrial Production (MoM)		0.20%	0.90%
28-Jun-13	JPY	Retail Sales (YoY)			-0.10%
28-Jun-13	JPY	Housing Starts (YoY)		6.20%	5.80%
28-Jun-13	GBP	Nationwide HPI (MoM)		0.30%	0.40%
28-Jun-13	USD	Chicago PMI		56	58.7
28-Jun-13	USD	Michigan Consumer Sentiment		83	82.7

Indian Economic Calendar

Date	Curr.	Event	Actual	Forecast	Previous
26-Jun-13	INR	Indian M3 Money Supply			12.10%
28-Jun-13	INR	Indian Bank Loan Growth			14.10%
28-Jun-13	INR	Indian Foreign Debt (USD)			376.30B

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